Business Unit: Department of Treasury
Executive/Director Name: Nick Khouri
Reporting Period: Feb 2018

Green >=90% of target
Yellow >= 75% - 90% of target
Red <75% of target
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Metric ID	Metric	Status	Progress	Target	Current	Previous	Frequency	Metric Definition
Customer/Constituent								
COLL-9	Percent of web payments received [1]	Red		65.00%	40.00%	36.40%	Monthly	The percentage of payment received via web
COLL-10	Telephone Call Quality Assurance Measures - Office of Collections.	Yellow		100.0%	87.0%	88.0%	Monthly	To provide quality information and customer service on telephone calls. Staff are measured on several key criteria which helps determine where overall training may be needed to ensure a high quality of service.
TPB-16	SUW Abandoned rate - number of calls on hold that choose to hang up instead of waiting for a Treasury Customer Service Representative to answer.	Red		10.00%	14.90%	13.00%	Monthly	Improve customer satisfaction by providing timely responses to customer phone calls measured by the number of people not willing to wait on hold for a Treasury Customer Service Representative. New metric as of 10-7-15.
TPB-17	Average speed of answer (ASA) on SUW related phone calls.	Red		7.00	9.55	9.03	Monthly	Respond to SUW phones calls within 7 minutes or less
LOGOV-7	Move distressed communities to fiscal solvency and stable self-governance	Green		4	1	N/A	FY Annually	EM exit, RTAB meetings from monthly to bi-monthly to quarterly, dissolving RTAB, successful termination of consent agreements.
TAXPOL-16	Issue 10 substantive Revenue Administrative Bulletins (RABs) annually.	Green		10	10 (CY2017)	8 (CY2016)	CY Annually	Improve communication to taxpayer/practitioner community by issuing a minimum of 10 substantive Revenue Administrative Bulletins (RABs) annually. (Note for 2016: 8 RABs, 3 Internal Policy Directives (IPDs), and 4 Tax Policy Newsletters were issued during CY2016.)
TAXPOL-17	Percent of guidance issued to taxpayer/practitioner within 3 to 6 months	Red	=	100%	0%	0%	Quarterly	Increase communications with the taxpayer/practitioner community to meet their needs timely. Note: One RAB was issued during the 3rd quarter of 2017.
Internal Business Process								
TPB-9	Timely Processing of Individual Income Tax filing exceptions.	Green		25000	26101	11673	Monthly	All current year Individual Income Tax filings, successfully captured into the IIT computer system and "flagged" as exceptions are reviewed and processed in the calendar year received. Target will fluctuate monthly depending on volume of returns received and complexity of returns.
TPB-10	Percent of returns processed compared to production plan	Green		100.0%	101.7%	100.0%	Monthly	All individual Income Tax returns are processed in the same year they are filed.
TPB-14	Forced SUW disconnects as % of the total calls received	Green		5.00%	0.60%	0.00%	Monthly	target of 5% or less disconnects in relation to total SUW calls received
TPB-15	All IIT correspondence processed in a timely fashion	Green	=	100.0%	100.0%	100.0%	Monthly	All Individual Income Tax correspondence processed within 60 days of receipt.
TPB-18	All Michigan Business Tax (MBT) correspondence processed in a timely fashion	Yellow		90.0%	78.0%	100.0%	Monthly	All MBT correspondence processed within 60 days of receipt
TPB-19	All Corporate Income Tax (CIT) correspondence processed in a timely fashion	Yellow		90.0%	78.0%	83.0%	Monthly	All CIT correspondence processed within 60 days of receipt
TPB-20	All Sales, Use, and Withholding (SUW)correspondence processed in a timely fashion	Green		90.0%	88.0%	90.0%	Monthly	All SUW correspondence processed within 60 days of receipt
COLL-5	Percent of accounts which had appropriate action taken within the last 30 days	Yellow		100%	85%	78%	Quarterly	Provide quality information and customer service during field visits to ensure timely collection and resolution of tax debts.
COLL-6	Percent of calls resolved on first contact	Yellow		100%	78%	89%	Quarterly	Provide first time call resolution for debtors contact third party collection agent.
TCBMSP-1	Inspections of Tobacco Retailers	Green		470	889	1182	Quarterly	This measures the number of administrative inspections of tobacco retailers and licensees by MSP and Treasury enforcement personnel each quarter.
TCB-9	Number of days to complete audit (combined number for various tax types) - monthly rolling average	Green	=	200	217	217	Monthly	Ensure efficient audits by reducing the length of audit to 200 days.
TCB-12	Number of days to process audit (12 month rolling average)	Green		195	115	120	Monthly	Process audits in timeframes (days) that exceed the requirement of PA3 of 2015.
TCB-16	Average Score for Field Audit Monthly Quality Assurance Review	Green	=	95%	96%	96%	Monthly	Maintain a quality score of 95% or better as determined by quality assurance review
TCB-22	Process all suspicious filer correspondence received within 60 days.	Green		95%	86%	99%	Monthly	Percent of suspicious filer correspondence completed within 60 days of receipt.
TCB-23	Process all IRS correspondence received within 60 days.	Green		95%	100%	97%	Monthly	Percent of IRS correspondence completed within 60 days of receipt.
TCB-24	Process all Discovery correspondence within 30 days	Green		95%	98%	99%	Monthly	Percent of Discovery correspondence completed within 30 days of receipt.
TAXPOL-13	Percent of hearings completed in less than 6 months	Yellow		100%	84%	80	Quarterly	Improve processes to reduce informal hearings process to take less than 6 months.
BDG-4	IT Projects on Time and Within Budget	Yellow		85%	71%	87%	Quarterly	Track IT projects with respect to budget and completion time to ensure the Department meets legal/statutory requirements. This data has a lag time of 1 month.
STC-1	Percent of Tax Exemption Certificates Processed	Green	=	100%	100%	100%	CY Annually	This metric measures the percent of tax exemption certificates that are processed each year.
LOGOV-8	Conduct Audit of Minimum Assessing Requirements (AMAR) reviews	Green		20.0%	20.0%	0.0%	FY Annually	Ensure fair, uniform and accurate assessments statewide by conducting Audit of Minimum Assessing Requirements (AMAR) reviews in the local units within 20% of the State's 83 counties annually. Maintain a five year cycle of reviews throughout the state.
OPS-7	Number of Material Security Breaches	Green	=	0	0	0	Monthly	Maintain and protect confidential information obtained through departmental programs.
Financial								
ORTA-7	Accurate Revenue Estimating.	Green		3.0%	1.4%	0.3%	CY Annually	Estimate revenues within 3% of actual. The accuracy of the metric impacts the state budget process.
BOI-2	MPSERS Quarterly rolling 1 year average return	Green		7.1%	16.2% 4Q17	13.8%	Quarterly	Actual investment rate of return on pension fund assets for the Michigan Public School Employees' Retirement System vs. Actuarial Target Rate

BOI-4	MPSERS Quarterly rolling 5 year average return	Green		7.1%	10.7% 4Q17	10.3%	Quarterly	Actual investment rate of return on pension fund assets for the Michigan Public School Employees' Retirement System vs. Actuarial Target Rate
BSAF-5(a)	State Credit Rating (Fitch)	Yellow	=	AAA	AA	AA	FY Annually	Ensure the state receives the best credit rating possible. A better credit rating allows the state to borrow money at the most competitive rates available. Ensures the financial position of the state provides a climate for business investment and citizen confidence.
BSAF-6(a)	School Districts Serviced Under State Aid Note (Semi-Annual August Borrowing)	Green		300	217	235	FY Annually	Provides access to short term loans for school districts. This metric goal is to reduce the number of school districts who need access to short term loans. Measured by the number of borrowings. Some school districts borrow more than once a year.
Learning and Growth								
EXEC-1	Improve Internal Communication Through Web	Green	=	100%	100%	100%	Monthly	Regularly update the Treasury Intranet home page to ensure staff have access to current information. This measures the percentage of time the web is updated at least monthly.
Good Government								
GG2	The percentage of champions identified in employee survey	Green		56%	54% (2017) 2015 Survey	49%	CY Annually	The % of champions identified in the statewide survey of state employees measuring employee engagement. Current value represents 2017 Employee Engagement Results.

[1] The status color for this metric reflects breaking points at 45% to 75% of the established target value.